

Having Community Information Integration (CII)/Central Patient Attachment Registry (CPAR) implemented at your clinic requires a number of key roles for success. They are:

- 1** Facilitator
- 2** Site liaison
- 3** CPAR Authorized Approver (AA)
- 4** CPAR Panel Administrator

Facilitator Role

Primary Care Network practice facilitator or similar

Practice Facilitators (PF) are specially trained individuals who work with community practices to enable meaningful changes designed to improve patients' outcomes and clinic processes. They help primary providers and quality improvement teams develop the skills they need to implement and adapt evidence-based practices to the specific circumstance of their practice environment. They are a key resource in the transformation efforts toward the Patient's Medical Home and Health Neighbourhood.

Facilitator Responsibilities and Tasks

Facilitators work in partnership with AMA ACTT consultants to:

- Discuss CII/CPAR training readiness and, if applicable, draft an engagement and implementation plan for the PCN
- Participate in CII/CPAR training
- Finalize implementation plans
- Collaborate ongoing as needed to support engagement and implementation

Facilitators can help coach and guide clinics when implementing CII/CPAR.

- Engage and share information with the clinic team by answering decision-makers' questions and pointing them to key resources.

- Provide recommendations to a team on the assignment of CPAR roles (E.g., Site Liaison, AA, Panel Administrator)
- Coach the Site Liaison on form completion (starting with the confirmation of participation form)
- Review Health Information Act requirements with Custodians and Site Liaisons
- Direct clinic to readiness and implementation resources such as the CII/CPAR Team Toolkit, clinic journey checklist, process map, EMR resources, etc.
- Assist the clinic to determine if they meet the participation prerequisites including:
 - Reviewing the panel readiness checklist results with the clinic.
 - Advise on changes to become panel ready, if applicable.
 - Privacy supports including the [PIA Update Self-Assessment](#).
 - EMR orientation information, mapping, and guides.
 - Assist with EMR configuration in readiness for CII/CPAR Go Live.
- Remain informed by reviewing eHealth communications sent to the clinic Site Liaison.
- Communicate regularly with the Site Liaison to identify if there are any issues or concerns.
- Facilitate post-implementation process improvement related to:
 - Entry of information into mapped fields and their display in the Community Encounter Digest (CED).
 - Panel conflict management.
 - Addressing demographic mismatches.
 - Manage eNotifications workflow.

*It is recognized that roles and responsibilities and titles of resources vary by PCN. The above responsibilities and tasks may be assigned to a facilitator/liaison or another resource for example panel manager, coordinator, assistant or clinic manager. Sometimes the PF and Site Liaison could be the same person.

CII/CPAR Site Liaison Role

The Site Liaison is the primary contact for the PCN and Primary & Preventative Health Services (PPHS) and supports a clinic with the implementation of CII/CPAR. This individual is a point-person identified by the clinic that will serve in a coordination role between the clinic, or provider implementing CII/CPAR and the support and implementation groups (PCN, AMA and eHealth Services).

Site Liaison Responsibilities and Tasks

- Coordinate the readiness requirements:
 - Privacy Impact Assessment (PIA) up to date.
 - Alberta Netcare enabled.
 - Panel readiness.
 - EMR version (Healthquest and Accuro only)
- Coordinate completion and submission of forms, letters, and agreements.
- Coordinate awareness and training.
- Assist with CII/CPAR data quality/validation testing.
- Support issue management.
- Coordinate and participate in evaluation activities.

CPAR Authorized Approver (AA) Role

Note: CPAR AA and CPAR Panel Administrator may be the same person, but separate forms are required to establish both roles.

Custodians may authorize any staff member to be a CPAR AA or it could even be the Custodian themselves. The CPAR AA will be responsible for the setup of provider panels within CPAR and granting, editing and revoking access to CPAR panels.

CPAR AA Responsibilities and Tasks

- Complete CPAR registration forms to establish both CPAR AA and Panel Administrators in the facility or when changes occur to either of these roles
- Learn the [AHS IAM application](#) in order to set up CPAR Panel Administrators. Access to AHS IAM eliminates the need to complete and submit Panel Administrator Registration forms to eHealth Services.

- Use the AHS IAM application to create, amend or delete Panel Administrator accounts, including the removal of panel authorizations.
- Request creation or amendment of provider's panel setup in CPAR in accordance with the provider's instructions by authorizing and submitting Panel Request forms for any changes to panel setup or panel status.
- Submit a panel termination request when the family practice is no longer responsible for managing an existing panel of patients and ensure that panel data submissions to CPAR are stopped for a terminated panel.
- Be the contact for PPHS and Alberta Blue Cross regarding CPAR account related activities or questions for the accounts under the CPAR AA's authority.
- Be the contact for PPHS or Alberta Health Services for all AHS IAM communications as they relate to the CPAR entitlement
- Perform access certification on an annual basis for each CPAR user (i.e. Panel Administrators), by logging into AHS IAM and extending the sunset date for the panels under their authority for an additional year or a time period that is appropriate. Receive automatic notifications from AHS IAM regarding due dates for annual certification.
- Refer to the [CPAR AA Guide](#) for additional details and instructions.

CPAR Panel Administrator Role

CPAR Panel Administrators are individuals within a clinic responsible for maintaining panel lists for Primary Providers that upload to CPAR and for downloading reports from the CPAR portal.

Each panel will have an associated Panel Administrator chosen as part of the CPAR registration process. One individual can be a Panel Administrator for multiple panels, (ie. A clinic with several panels can appoint the same person to be Panel Administrator of all the panels) or each panel can have a different Panel Administrators.

CPAR Panel Administrator Responsibilities and Tasks

- Ensure that the provider's panels are up to date and maintained in the EMR. This is likely to include:
- Ensuring that clinic processes for panel identification and maintenance are in place, widely understood, and consistently applied.
- Creating saved searches/queries (report criteria or templates) in the EMR that allow consistent generation of panel lists used to manage panels. This will be based on the training provided for each EMR.
- Working with the clinic team to ensure the panel lists are maintained and accurate at regular intervals by applying the clinic's definition of paneled patients (active and attached) to the lists from the EMR and removing any patients who no longer apply. Many clinics have routine times when they do their panel maintenance.
- Checking that panel lists are ready and accurate for upload to the CPAR portal, which happens once per month.
- Having access to the Primary Provider's Prac ID and the Facility ID for the site.
- Access to a web browser (Internet Explorer, Edge, Chrome, Firefox or Safari) on its latest release.
- Access to a spreadsheet application (e.g. Excel, Open Office) and basic knowledge of how to use the spreadsheet application in order to open and sort the Conflict Reports generated by CPAR.
- Log into Central Patient Attachment Registry monthly to retrieve Conflict and Demographic Mismatch reports. These two reports will be available shortly after the panel upload period has ended.
- Keeping administrative information current in CPAR through the ability to view, add, edit, or remove (panel details and clinic contact information for the panel.
- Be the contact for the CPAR Registry Administrators regarding panel management within the CPAR application.
- Refer to the [CPAR Panel Administrator Guide](#) for further details and instructions.